



# STATE OF MONTANA DEPARTMENT OF REVENUE JOB PROFILE

**Working Title**  
Registration Assistant

**Job Code Title**  
File Clerk

**Pay Band**  
02

**Job Code Number**  
434712

**Information Management and Technology Division**  
Information Management Bureau  
Mail and Imaging Unit

**Fair Labor Standards Act**  
Non-Exempt

The Montana Department of Revenue administers more than 30 state taxes and fees; establishes values for taxable property, including agricultural land, residential real estate, commercial real estate, forest land, business equipment, railroads and public utilities; supervises the operation of the state agency liquor stores and administers the laws governing the sale, taxation, and licensing of alcoholic beverages and tobacco products; returns unclaimed property to its rightful owners; and determines how state taxes and liquor and tobacco laws apply to Indian Tribes and tribal members in Indian Country.

The Information Management and Technology Division serves as the operational foundation for the department's business units. Through secure, up-to-date computing and processing environments the division's Information Technology Bureau (IT) and Information Management Bureau (IM) contribute to the department's overall efficiency in document and payment processing while ensuring confidentiality, integrity, and availability of taxpayer data, whether in paper or electronic form. In providing these services, the division enables the department to meet its business objectives and facilitates its mission to serve the citizens of Montana. The division also includes the Administrative Team. The Information Management Bureau ensures secure handling and delivery of taxpayer information, payments, and data to the appropriate systems and staff. The bureau is organized into four units providing tax return and payment processing including Account Maintenance and Cashiering, Information Capture, Electronic Services (E-Services), and Mailroom and Imaging. The Mailroom and Imaging Unit is responsible for the secure handling, delivery, and processing of department mail and taxpayer records.

## **Job Responsibilities**

The Registration Assistant registers and processes general taxpayer information and provides a range of general services in support of mail services, records management, data processing. This includes establishing database files; receiving, verifying, and entering data; sorting and routing documents; and assisting with data quality control. The position reports to the Mail and Imaging Unit Manager and does not directly supervise other staff.

### **• Taxpayer Registration and Document Processing 70%**

1. Accurately maintains, updates, and/or adds taxpayer account information as submitted on paper documents or electronically filed tax returns via registration functions in the department's tax processing system for a limited number of tax types according to established guidelines.
2. Assists with records management to ensure easy access, efficiency, and completeness of records. This may include retrieving and routing files for requestors, updating file out-slips, organizing files by document retrieval numbers, sorting and routing information, searching for lost files or contents, and closing or purging files.

3. Receives and reviews incoming tax document information for accuracy and completeness. Sorts paper tax returns for further processing.
  4. Identifies errors and omissions. Resolves basic errors or refers to appropriate staff for resolution.
  5. Numbers paper tax returns using an automated numbering machine. Sorts them into batches and routes to appropriate staff according to desktop instructions.
  6. Ensures secure handling and delivery of taxpayer information and system reports to appropriate staff.
- **Processing Support Services 25%**
    1. Assists with payment processing by verifying payment voucher and taxpayer data.
    2. Assists with processing taxpayer files to ensure easy access, efficiency, and completeness of records maintenance. This may include receiving and verifying information, sorting and routing information, searching for lost files or contents, retrieving files for requestors, and closing or purging files.
    3. Assists with routing mail and other documents, processing general taxpayer information by setting up database files, receiving and verifying information, entering data, and data quality control measures such as tracking productivity.
    4. Takes part in testing new or changed processes to find and solve problems and help determine the effectiveness of the process.
    5. Responds to requests and questions from other units by locating and providing requested information and referring specific and technical issues to appropriate staff.
  - **Other Duties 5%**
    1. Performs a variety of other duties as assigned by supervisors.

### **Job Requirements**

To perform successfully a registration assistant the incumbent must be self-motivated; possess a strong work ethic; maintain a positive attitude; and enjoy working with, and for, the public. Skills in multi-tasking; paying attention to details and accuracy; organizing multiple tasks within short and inflexible timelines; mathematics; providing timely and effective written, verbal, and interpersonal communication; customer service; conflict resolution; following written and oral directions and instructions; identifying and correcting data errors; and word processing, spreadsheet, and specialized database applications are required. This position works with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job.

This position requires general knowledge of automated data processing systems, records management, office operations, and customer service standards. The incumbent must have the ability to develop a progressively responsible knowledge of department work units, functions, and operations.

- The minimum level of education and job-related work experience needed as a new employee **on the first day** of work is graduation from high school or GED and one year of job-related work experience in data processing and/or records management.
  - Other combinations of education and experience will be evaluated on an individual basis.

### **Department Core Values**

- **Respect:** As a representative of the people of Montana, proceeds with the highest level of respect for the dignity of every person contacted through work. Without exception, all people are treated as equally as possible. The employee is a faithful steward of the resources provided to this agency by the citizens of Montana.
- **Integrity:** Conducts work honestly and makes decisions that establish a clear record that the department serves the public with integrity. Apologizes for mistakes and gives credit to others for their cooperation, work, and ideas in achieving positive results. Accountable for their actions and

holds others accountable for theirs. Decisions and judgments achieve equity and justice for all parties involved including citizens and co-workers.

- **Productivity:** Consistently strives to minimize the waste of the department's financial, facilities, and human resources. Diligently works to improve the productivity and effectiveness of the work unit. Welcomes and encourages new ideas on improving the results of the department from the public, other officials, colleagues, and supervisors. Approaches work in a manner that builds goodwill, trust, and cooperation internally with other staff and externally with the public.
- **Teamwork:** Maximizes cooperation and teamwork when working with other employees, divisions, and other state agencies. Willing to work with others for the opportunity to learn from their ideas, talents, and knowledge. Seeks to resolve conflicts with other employees and work units in an open and respectful manner that reinforces teamwork. Celebrates the successes of others.

### **Working Conditions**

Must work under time constraints, be able to maintain numerous projects at one time, and determine priorities on a daily basis. At times, the incumbent will deal with difficult individuals to resolve concerns or to bring about compliance with regulations. This may cause stressful work conditions and a high degree of mental stress. As a Department of Revenue employee, the incumbent may come into contact with highly confidential financial and tax information and is required to maintain the highest level of confidentiality regarding all information acquired or used in performing this job. This position requires considerable computer and keyboard use and being seated for extended periods of time. Due to peak processing seasons, incumbent may work in excess of 40 hours per week which may include evenings and weekends. Lifting is infrequent, less than 15 pounds and includes carrying light items such as papers and books. This job requires regular attendance as scheduled by the supervisor. This job cannot be performed at an alternate work site.

### **Special requirements**

- **Background Examination:** Applicants for this position will be subject to a criminal background review before being considered for employment. Individual circumstances involving a criminal conviction will be reviewed to determine an applicant's eligibility for employment.
- **Compliance with All Appropriate Montana Tax Laws:** An employee's tax status must be current.

**This job profile was produced by the Office of Human Resources in conjunction with the appropriate managers.**

**Division Administrator Review:** The statements in this job profile are accurate and complete.

Signature: Margaret Kauska, Division Administrator Date: August 2010

**Human Resource Director Review:** The Office of Human Resources has reviewed this job profile.

Signature: JeanAnn Scheuer, Human Resources Director Date: August 2010

**Employee:** My signature below indicates I have read this job profile and discussed it with my supervisor.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name (print): \_\_\_\_\_